Kansas Department of Health and Environment

Moderator: Jane Shirley
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3:30 p.m. ET

Operator: Good afternoon. My name is (Patsy) and I will be your conference operator today. At this time, I would like to welcome everyone to the Aid to Local Catalyst Webinar. After the speakers' remarks, there will be a question-and-answer session. If you would like to ask a question during this time, simply press star then the number one on your telephone keypad. If you would like to withdraw your question, simply press the pound key.

I would now like to turn the call over to Ms. Jane Shirley. Ms. Shirley, you may begin your conference.

Jane Shirley: Great. Thank you so much, (Patsy). And welcome, everyone, to our afternoon session of our Catalyst Get Acquainted, I guess, Webinar. I want to let you know that we have several individuals in the room here at KDHE from the programs that have grants in the Aid to Local System. We don't have quite every program represented but if we have questions that are program questions, we have them here to be resources or obviously we will get questions answered from those programs who were not able to be here.

We do also have Kevin Shaughnessy here with us at KDHE and he will obviously be here to answer any fiscal questions that come up. We have on the line Tamara Goldsberry who is one of the support specialists at Spectrum Health for Catalyst and Dr. Ryan Loo who was the Spectrum Health Policy Research President and they are definitely our experts and our resources.

We will be asking Ryan to give us some background information specifically about the operations of Catalyst but let me give just a few comments that are issues that – and things that I want to be sure you're all familiar with. You have hopefully received access to the Catalyst system through the Catalyst server. And you have at least one username and password for your organization. If you are not able to get in to the system or if you need additional usernames and password, we would ask you to contact the support staff and they are at support@shpr.com and that is a connection that we can repeat or send to you if you need it.

The strategy for right now is that each organization would have just one common username and password for starter. But we do understand that there are some organizations that for operational purposes they just simply need more than one. And so, if that's the case and you don't have what you need yet, again, contact the support staff at support@shpr.com.

I want to remind everyone that we have an Aid to Local page on the KDHE Web site. That links you to both the generic and general information, several help guides and user information and also links you to each one of the programs that grants are available for the process through the Aid to Local. Even if you've done application for Aid to Local in the past, I strongly encourage you to go checkout the guidance documents and the links. Every program has some changes every year. And in the use of Catalyst we have potentially additional changes that you might not be aware of if you are not checking on those guidance documents on the Aid to Local pages.

We strongly encourage you also and I know you've all been notified several times to take the courses on Kansas TRAIN that will familiarize you with the Catalyst operations. There are four fairly short and very to the point trainings that have screenshots and instructions on how to get in and how to navigate around in Catalyst. And we hope that you will do those courses – or the course numbers and the links to Kansas TRAIN are right on the Aid to Local Webpage and I just encourage you to go there so you can see those listed and go straight to them.

There are a couple of changes from the program that I oversee which is the State Formula funding. I do want to be sure all health departments know that prior to this you've never done a budget for the Formula Grant. You still don't need to do a budget but you need to access the budget line in order to submit a total allocation request. You won't have to put any details how you plan to spend the money but in order for your total request at the end of your application to include this Formula dollars, you need to put in a total for the budget request for Formula.

We also realized that we have asked quite a lot of questions in the Formula survey, the survey questions. We've taken this opportunity to combine our purposes with a survey that the Kansas Health Institute was planning on releasing and so we have compiled those together so that you would be able to just do them one time through this particular process.

One other question that I want to mention is that you're going to see some issues about requirements in order to complete your grant application. One of them in particular is that each organization that needs to have a (DUNS) – a (DUNS) number, you need to sure that if you don't have one that you go ahead and submit to get one so that you don't wait until the very end and need that and it takes a few days to get.

So I just now want to kind of in summary tell you that we are really, really excited about our ability to transition the Aid to Local process over to this entirely online system. We do realize it's going to take some time for us to get everything working the way we want it to to get the features that we think will be most beneficial for both all of our grantees and for the programs here in KDHE. So, it's going to take some patience from everybody but we know we're going to get there. We're very thrilled to be working with this excellent staff at Spectrum Health Policy because they are simply the best. And that will lead me to turn this over to Ryan Loo with Spectrum Health and have him walk us through some general information that everyone is going to appreciate hearing about. Ryan…

Dr. Ryan Loo: OK.

Jane Shirley: …take it away.

Dr. Ryan Loo: Thank you, Jane, I like that, simply the best. Thank you.

Jane Shirley: That’s right.

Dr. Ryan Loo: OK. So what we’re going to do is we’re going to run through a couple of slides to give you an idea of some features that will be rolled out in Catalyst by February 9th. They’re not viewable in Catalyst right now but we want to give you an idea of some of the things that were originally planned but didn’t quite make the January 15th deadline and they’ll be rolled out on January – or February 9th. We’ll be going over those.

And then at the end of my presentation, we’ll pause for a few questions. And then I also have a set of seven questions that we seem to be getting as regular pattern in request for technical assistance that we just like to answer globally so everyone can hear those answers. We should be able to assist you in the development of your application.

So why don’t we go ahead and get started, (Tamara). Go ahead and load the first slide.

OK. So, you should be familiar with your profile page at this point. You should have accessed the Web site and gone in and checked out your information. One of the first places that you go is your profile page. And you can see in the upper right hand corner indicated by the red arrow but you would click on “Edit Profile” to go and see this portion of your screen where you can see your username, first name, last name, e-mail address. And then we also have, as you can see, indicated by the red box down there, the red box will not normally be viewable on your screens but they’re viewable for this presentation just for presentation purposes.

But what we’ll be adding on February 9th is two new boxes, one for your federal employer identification number and one for your (DUNS) number. And to the right of that, you can see there’s a link that will send you off to obtain your (DUNS) number. So both of those are not currently – both of those fields are not currently viewable on your screen but they will be viewable on your screens by February 9th.

Now it’s important to remember that some of your applications are going to require a (DUNS) number and we’ll talk about that a little bit later in terms of finalizing your application. But something to keep in mind is it can take two to three days to complete the application for your (DUNS) number, at least obtain your (DUNS) number so we'd recommend taking that time or planning that out, not waiting until March 15th or 13th to obtain a (DUNS) number. That's something you probably want to get working on fairly quickly.

Next slide. OK, so in addition to the federal employee identification number and the (DUNS) number field, we have two more export buttons that are currently not viewable but they will be viewable as of February 9th. What you would do is you would go to your organizational summary sheet which is, if you can see indicated by the red arrow on the left hand side, you click on "Organization Summary." And then you'll see two new buttons in the bottom right hand corner by the proposed budget. One is the export budget and export detailed budget.

The export budget will export a summary budget for all applications for your – for your organization. So in this county – or in this example, we have Barbara County who has applied for (1422 CVRR) across the board. They can go in and hit "Export Budget/Export Detailed Budget" you know pullout the budgets for every single one of those applications all together in one summary. We know that many of you use that information to brief your executive management as you're finalizing your applications, so we want to make sure that that button was available to you by the time you move in to the later stages in the application.

Next slide. In addition to be able to export all of your budget, you'll also be able to export a single application budget. So in this case instead of going through organization summary, you're going to click on the actual name of your application. In this case, it is a family planning 2015/2016 grant. You apply – you click on that as indicated by the red arrow and then you'll see the button down under "Budget" which is export a detailed budget which will allow you to extract this budget from the system.

Next slide. We also want to give you an idea of some new buttons that are coming to the organization summary page. But where you'll see this is if you're in the type of plans, as you can see at the top there, you set that to application and then click on your organization summary. You'll see three new buttons off to the right there. You can see there's a summary, a signature and a finalized button.

You'll also that there are some red triangles there with a exclamation point – or I'm sorry – yellow triangles. Those yellow triangles are warning signs to tell you that you're missing something for that application. At this point, the warning sign means a (DUNS) number is requested or (DUNS) number is required and you have not entered the (DUNS) number. So, when you see those warning signs, essentially that means you go in and fix – or you enter in your (DUNS) number and that will take care of that warning for you. Now, of course, you can't do that until February 9th when we create those fields so that will be something to rectify at that time.

What I want to draw specific attention to are the first two buttons, summary and signature. And then in later slides, we're going to over the finalize button. First of all, the summary button – I'm sorry – the signature button is going to allow you to download a page that is similar to your signature pages you've had in previous years. The summary page is going to download a set of budgets or calculations that come from Catalyst. And you'll need those two items by the time you finished all of your applications and moving towards submission.

So let's move on to the next slide to talk about what the summary and signature pages are. In the upper left hand summary, you can see there is a grant summary. This is what will be generated by that summary button. It lists the name of your health department or the applicant, list all of grants – all of the grants that you are applying for. There will be a green check mark to tell you that you have actually added it to the application, meaning that we understand that you are applying for this particular grant. You'll also see a second column which tells us whether or not you have submitted that application or not.

Finally, in the requested amount column, that will give you a total dollar amount of what you have requested for this particular grant. Now, of course, we listed Barbara County since it's for the presentation purposes. These aren't the actual numbers being pulled from Barbara County. This is just a demonstration. You take the requested amount numbers that are being calculated for you from Catalyst from the grant summary page, click on the signature page downloading – you're able to pull that signature page down and you'll have to fill out the signature page manually as in handwritten. So you'll take signature page, fill out your information and on the side where it shows you what are your total request, you enter in the information directly from what you get from the grant summary page.

Just for future reference, Catalyst will – and in future year, generate the signature page and populate those requested amounts for you. But this year, the best thing we can do is provide a grant summary page and ask you to manually fill that out given the fact that we're going to have the signing that signature page and moving forward with that as well.

So in summary, you go to the summary page, download that, that gives you your numbers. You pull the signature page, fill out that information based on what you find on the grant summary. Fill out the remainder of your signature page, sign it and then you're going to scan it for electronic submission. And that's when we go in to the next page – next portion of the presentation.

So let's assume you've already – you've downloaded your summary, you've downloaded your signature page, you've filled it all out, you've completed all your applications, you have hit "Submit" on each one of those applications. I want to make sure that there's a distinction because that was a clarification this morning. You understand that you can go in to each application and submit the application. That is the step that you should go through, submitting each one. And then on your summary page, it will tell you that it is submitted. But once you have submitted all applications, you then move to the finalize button, which you can see indicated by that red arrow. You hit the "Finalize" when everything is completed in the system, meaning you are completely done working in all applications.

That was another clarification question from this morning and say, "Well, can we submit one grant while we're still working on another?" Absolutely. Feel free to submit different applications at different times so long as you do it before the deadline but you definitely want to do the finalize button when all applications are finished. So when you click on that finalize button, that moves you to the next page. And it will load this final page which is finalized applications. And you can see from the instructions it says, “This is the final step of submitting your applications. Once you complete this step, you’ll no longer be able to modify any of your applications. Please verify that you have completed and submitted all of your applications before proceeding. Please fill in the form below and then click “Finalized Applications” button.”

So here is the difference, when you go ahead and click “Submit” when you’re submitting your applications on the previous screens that you’re aware of through the KS TRAIN Web site, it tells you about submitting your applications, this is your final step of finalizing – or finalizing your applications as you can see from that second paragraph, “Once you complete this step, you’ll no longer be able to modify any of your applications.” So what does that mean? Currently you go on to your landing page and hit application and it shows you everything that is in application status. Once you hit “Finalize”, these things are going to move into a review status so you’ll be able to view this in the review phase.

What happens in the review phase and once you finalized is you will be able to view your application, you’ll be able to print your application, you’ll be able to do all those types of things but you’ll not be able to add anymore attachments, you’ll not be able to modify attachments, and you’ll not be able to change anything within your work plans or applications. It essentially sets it to a view-only mode and you can no longer modify anything. So that’s what happens when you hit “Finalize.” As you can see, it also tells you that this step will be stamped with the following information which will be your name and the date that you click “Finalize.”

Remember, your signature page, you have scanned that and you have an electronic copy. You go ahead and upload that signature page by hitting that “Select” button which will then allow you to find that file, upload it and save it there. And then you answer your questions whether or not your agency is required to have an (on be circulated). That is going to be a yes or no question. You can click on that eye to the right of that question mark at the end of that sentence and they'll give you more…

Jane Shirley: Hey, Ryan?

Dr. Ryan Loo: …(about – or be circulated). Yes.

Jane Shirley: Ryan, can you stop just a second? Hey, (Patsy) – (Patsy), we seem to – are you there?

(Patsy)?

Operator: Yes, ma'am.

Jane Shirley: We seem to not be able to get any participants in. Can we double check the phone number with you?

Operator: For the participant?

Jane Shirley: For the participants?

Operator: Yes, ma'am, (right ahead).

Jane Shirley: The one that we currently have for participants is 877-388-6280.

Operator: Yes, ma'am, I have approximately 50 participants in the conference at this time.

Female: Because several people are trying to call in and they couldn't get in…

Jane Shirley: OK.

Female: …couldn't get in.

Jane Shirley: There are some individuals that are trying to call in but couldn't get in. We will…

Operator: OK.

Jane Shirley: …double check that we have that on our – on our Webinar again. We will repost that. OK. Carry on, Ryan, thank you.

Dr. Ryan Loo: OK. Something to consider as you guys are sorting that out, Jane, I know and we go to Webinar in the past that we can set (caps) to the Webinar so I wonder if this one is (cap at 50).

Jane Shirley: No, we should have – we should have plenty of people. Plenty of space here.

Dr. Ryan Loo: OK.

Jane Shirley: Just to reassure everyone on the line, if you are cutting in or cutting out, we will be developing a – from the calls we'll all be providing a transcript and we will be developing Q&A from the transcript so pretty much everything that's in our Webinar should be available in a few days early next week.

All right, let's carry on. Thank you very much for letting me…

Dr. Ryan Loo: OK.

Jane Shirley: …interrupt the call.

Dr. Ryan Loo: OK. So, you have finalized applications, you've uploaded your signature page, (and ask) your agency require for an OMB Circular, you can click on the eye right there to the right of that question mark which will explain to you what an OMB Circular is. You can also type OMB Circular A-133 in Google. And it will tell you everything about OMB Circular. But it's a yes or no question if you haven't been exposed to this in the past.

We go through, you finalized that page, hit "Finalize Application", confirmation will pop up to confirm that you truly want to finalize and then everything will be shut down into a view-only mode.

I believe that is the end of the presentation, is it not, (Tamara)? OK, perfect. So, that is the presentation format. What I'm going to do now is I'm going to move in to the seven questions that we know are fairly standardized. I'll provide answers to those questions. And then I believe – I'll go ahead and turn the time back over to Jane, then we can move in to questions and answers you might have had for the presentation or any that we have in the queue or anything I'm about to bring up in the phone call now.

So, one of the common questions that we've been receiving in terms of technical assistance is folks have been asking us, "How do you print your application?" Some of you have been struggling with going to your organization summary page or going to your budget page and trying to print your application. In order to print your application, what you need to do is you need to click an item within that application. So, that we have a lot of menus and screens that are available on your – on your screen at any given time.

Catalyst doesn't know which application you want to print when you hit "Print", so we actually – so we don't offer a print button. You actually have to go into an application before a print button will appear in your upper right hand corner of your – of your menu bar. So go in to an actual item of your plan, hit "Print" and then that will allow you to export to PDF, to Word or just view it online, however you'd like to see that.

Question number two of seven is, "How do we print a blank plan so that we can see the fields and questions?" This is a biggest topic of discussion in this morning's Webinar and it is the most common technical assistance we request that we receive. Essentially people are asking for the ability to print a blank application so that they can see all of the required field. Currently within Catalyst, the default is only print items that have a response in the field. So if the fields are blank, when you hit "Print", nothing will appear.

So just so you know Catalyst is operating for the perspective of printing only fields that have content. But we do also realize that as you're gathering your information trying to figure what your requirements are but it would be useful to at least (view) all questions. So the response that KDHE has come up with which is the Kansas Department of Health and Environment. KDHE has asked all program contact to actually writeup another guidance document that has not been released yet but they are going to be writing a guidance document that include each of their questions and an outline of the entire application so that you can see those document.

I believe they're going to be available within Catalyst throughout will be available in your organization's summary page, I'm sure they would also be e-mailed out. I mean, there will be a lot of different places that you'll be able to see them once they actually are released. And folks are working on those currently and trying to move those along as quickly as possible.

But to answer the question, can you print a blank plan? No. You'll only print those items that have content in the field. How can you see an outline? That guidance will be coming out from KDHE shortly.

Moving on to question number three, "Is the user notified when the field is not completed? So, for example, when they save a page and the field is blank." The only time you'll receive – so this is the answer, the only time you'll receive a warning or notification is if you leave a required field blank. Any fields that are not required, you'll not receive any warning that you didn't put anything in that field. So certain fields are marked as required, certain fields are marked as not. And those decisions on required or not required field were individual program decisions.

So, when you're on a page and you hit "Save" and you missed a required field, that's where you'll receive a notification. However, if you don't even open the page and you go to submit an application or finalize an application, we will not be giving you any notification at that point to say, "By the way, you missed this required field or there's missing field in the rest of your application." The reason is is we are instructed that the KDHE made a decision that say in this first year, we should not provide any barriers to submission but essentially we can accept your submissions in any way, shape or form which forces us to remove some of those checks or barriers that would prohibit the submission of application.

So, this year, there are not any notifications other than when you are in page and a required field is filled out. So that is something you'll want to keep in mind.

Question number four of seven, "When the application is printed, do blank spaces appear on the printouts or do the text fields print all merged together?"

And the response to that is we do not insert a lot of white spaces. There is a certain amount of white space to just make it easier on the reader specifically the reviewers when they get to review maybe a paper application or paper printout of your application. But for the most part, no, we are not inserting big chunks of white space or anything like that. There will be headings, there will be your content.

And if you go ahead and hit "Print" while you're in an application, that will give you an idea of exactly how KDHE will print it out as well. And if – as Jane mentioned earlier, you can go on to the KS TRAIN Web site, there is a video that talks about how to print and export and gain copies to your information. You can also click on the question mark in the upper right hand corner of Catalyst. And there is a large selection of technical assistance videos and PDFs that can walk you through. And I think there's even a section called printing and exporting. That should help you through that entire process.

Number five, "Where are users or an organization added?" So this question came up on adding more users or getting more user accounts for Catalyst. In order to gain another user account for your organization, you're going to want to contact us at Spectrum Health Policy Research which is the parent company that owns Catalyst. You'll want to contact us to obtain another username and password if you find use for that.

To contact us, just go to catalystserver.com which you know is the Web site that we're using for the Catalyst submission. In the upper hand – upper left hand server – I'm sorry – in the upper left hand corner, as you can see on your screen now, we have a "Contact Us" bar. There is our phone number. There is an information e-mail. If you contact either of those resources, that will give you access to us. I also know on the KDHE Aid to Local Web pages, our number is listed there along with all of your program contact numbers. And then technical assistance numbers are also (streaming) throughout the KS TRAIN Web site so you should be able to gain access to these technical assistance resources fairly quickly along those lines.

Now, one of the things to remember is that if you do ask for additional usernames and passwords – this question came up this morning as well. And it seems to be a trend that we're responding to. We cannot differentiate within your organization this year, at least for this year than what we're doing in 2015. We cannot differentiate between user accounts within your organization.

So let's say for example, Shawnee County comes in and they say, "We want three different user accounts and we want one user account to have access to these three applications but we want this other appli – these other user accounts to apply to three other applications but we don't want them to see each other." That's not how it works in year one. That's not how we work in the Catalyst this year. If you have a user account, that user account will have access to 100 percent of your applications. It will have access to 100 percent of your budgets. It will have access to everything that you have in the Catalyst system at this time.

There is a current discussion at KDHE to change those types of permissions in year two or three but currently we do not have any of that permission changing access in the current solution. So just know if you are getting that usernames and password, it's not changing access. Everyone has the same access and they have access to all components of your applications within Catalyst.

Question six and seven, "Does Catalyst have spell check?" No, it does not have spell check. And one of the reasons that I made that architecture decision on how Catalyst is ran is browsers now have the capacity to run spell checks so I figured since we are a Web-based system, we are offered three Web browsers, there is no reason for us to create spell check if your browser will do spell check for you. So, Catalyst does not do spell check but you should be able to do spell check on your own through your own browser.

Now, each browser does it differently, whether you're using Chrome or whether you're using Mozilla Firefox, Internet Explorer, so what you would want to do is you want to check online to see how do I run spell check on my particular browser. Let them know what type of browser and version you're using because everyone will be different. And identify how you can use the spell checking attributes of your particular browser to address that issue.

And finally, question number seven, we keep having folks ask us whether – or the same that they can't find the grant application signature page when they go to the organization summary page. I just want to remind everyone that the field, the grant application page, the summary page, federal employee identification number, finalized, all of those that we presented in the PowerPoint today, they will not be available until February 9th. So, of course, it makes sense, you will not see them right now.

You will not see them until February 9th so we'll just have to ask you to be patient and wait for those buttons and features to become available. We figured since they are related to submission in the end of the process, we figures it would be OK to wait until February 9th to launch those. And KDHE has agreed with that.

Jane, that is the end of our official presentation and the set questions so I'll turn the time back to you.

Jane Shirley: Great. Thank you so much, Ryan. Actually, I have just a couple of comments for clarification that I can add. One of them is that the grant application signature page is it should download as a fillable form so that you can just fill in the amounts and the information that you need and then print it, take it off to your board, your commissioners have them sign it and then scan it and upload it. If it doesn't work as a fillable form, then that's our error and we'll try to get that fixed as soon as we can once it's up there.

I also would let you know that I have not yet asked the programs to do the list of questions but I will ask them tomorrow morning to start developing that for you. And then, this is a question for you, Ryan, can we just have the system send out a notification to everyone when those are available, could be seen on the Web page?

Dr. Ryan Loo: As in when everything goes live on February 9th that we send out a notification?

Jane Shirley: Well, I was thinking of both times. So if we're able to get that list of questions up early next week, it would be great if we could just notify everyone that they're up there. And…

Dr. Ryan Loo: Yes.

Jane Shirley: …then I definitely agree that we can send a reminder on February 9th that the new things that we have just reviewed, the yellow triangle, the signature page, the finalize button, that those are available. And, again, just have the system send out a notification to all users.

Dr. Ryan Loo: OK. (Tamara), go ahead and make a note that we'll be sending through the notifications portion that we will be doing the notification for the outlines. And then also let's plan for the Sunday night, this will be February 8th, we'll send out a notification at that time so when we run both processes at 4:00 am, that will hit everybody's e-mails first thing in the morning when they show up so it will be available first thing when they come in on the 9th.

Just so everybody understands how the notifications process works within Catalyst, if you go – well, while you're in the system, in the upper right hand corner, you'll see a – (Tamara), why don't you log in and show them what that button is. When you go in to the system, if you look in the upper right hand corner, there's a little bell. And you can see in this case, (Tamara) has 10 notifications, those little bells. So anytime you come in and there are notifications that anyone is trying to send to you, that's where they will be. You can click there and it will pull up the information necessary.

The both processes that I talked about that happen at 4:00 am is at 4:00 am if you haven't gone in and looked at any of your notification, our system will automatically send you an e-mail to tell you that there are notifications within Catalyst that you need to log in and go take a look at.

In order to make sure that that e-mail and everything works, I hope that all of you have gone in according to your guidance, clicked on your name – (Tamara), show them. Go ahead and click on your name and click on "Edit Profile" which is one of the first steps that you're supposed to hit. And make sure that your username, first name, last name – I'm sorry – they'll message your username because you already have that. But your first name, last name and verify that that e – mail address is current because that's where we will send all notifications.

And just as a reminder, this is a private system. Your e-mail addresses are not used or stored or sold for any reason, shape or form. This is a government-funded system that we're using here and so we can't be using those for marketing purposes or any type of private business ventures. So you don't have to worry about those e-mails being used for anything other than the notifications that come from this system.

Jane Shirley: Great. Thank you very much, Ryan. And I'll just point out to everyone that's on the call and in the room that now you're getting a glimpse on just how exactly how we are working together to make these things happen. We discussed these suggestions and modifications on the phone. Ryan and his staff are often some magical place – called it (inaudible). And actually, we have worked for hours and hours together on this. And for the most part I have, except for Ryan, have not met each other face-to-face. It's an amazing process.

One other thing I want to mention is that there is one question and I was actually going to mention this, the question is, "Is there a later phase in the application process where you can make modifications or add attachments after the finalized application stage?" You will be able to make modifications or add attachments up until you hit that final submission button. And so, even if you have actually submitted one application – am I – I'm correct, Ryan, you can go back and make edits and resubmit that application. But once you have submitted that final big red button, then you're done and you won't be able to go in and make edit.

Caveat to that…

Dr. Ryan Loo: Yes.

Jane Shirley: …if – I'll let you answer that but I do want to also mention that if the program then feels there is something in your application that is either an error or it's missing, we will have the ability to work through the support@catalyst to give you access to get back in to make an edit or upload an application or an attachment. But that will be individual permissions in order to get back in.

Dr. Ryan Loo: That is – that is correct. Jane, to summarize this process (probably) that one you hit "Finalize", you move in to view-only which will prevent you from doing anything else in the system other than viewing and printing.

The access that could be provided during the review phase, as you mentioned by KDHE that maybe the individual programs, reviewers want to grant you access so they can modify something, maybe they have a clarification of wording or they don't like your smart objective, they like you to adjust it, they can grant access to individual items within your plan. They most likely will not grant access to your entire plan but just a single component to say, "Change the wording of item A.1.1. Here's your access. You go in and you have 72 hours to correct it." And then they'll change it out.

When we get to that phase, they will definitely keep you aware of when your access is open and when it's close. But, yes, that is a summary of how the process is going to work.

Jane Shirley: Great. We have a couple more questions that have been typed in and then I will turn the call over to our moderator. But let me get to this for one of – one of our participants asked, is there any way for us to give them a mock application and give us some examples to view. I don't know that we have that capability but I hope that it will help you if we develop the list of questions for each program. I think that might give you at least a step in getting some of what you were going to be needing to fill out.

I also wanted to encourage you to go in and play around in it. Go in and click everything open, look and see where these questions are, practice entering them. There is not – you can't break it and you can go back and edit and change it once you have clicked something in and realize now I understand how it works. So do that and then remember you can make edit and clear and so you submit that final button.

Another question is…

Dr. Ryan Loo: Jane…

Jane Shirley: Oh, go ahead.

Dr. Ryan Loo: Jane – yes. (Tamara), why don't you go ahead and log in under the APL demo for accounts and go ahead and pull up the organizational summary page. To back exactly what Jane just said, you really can't break anything in there. You can go ahead and play with whatever you'd like. You'd want to obviously do all of your playing before you start entering in your official data in case you have to reset.

But feel free to play around as much as you want. You can add applications, remove applications, do as much as you – much as you want there. Let's even say, (Tamara) show how adding child care licensing, just go ahead and hit that plus button. It will bring it over. You could hit the red x so childcare licensing is there. Hit the red x, it brings it back off. There's no problem, you can do these types of things as much as you want.

But the one thing that I would like to clarify for you is that if you are within an application and you hit the "Opt-out" button, some of the programs you're using opt out, some of them are not. So you might look at – you might not see the opt-out button in the system, some of you might. (Tamara), can you pull up one that actually shows the opt-out button. I don't know if we have one right off the top here.

OK, so here's an example. If you are playing around in your applications like that and you happen to hit the opt-out button – (Tamara), hit "Opt-out". She's hitting opt-out on work plan D111. What this allows you to do is to have items taken out of your plan. So now if you look over on that left hand side under strategy D11, there is no longer a work plan D111. There's only D112. That's because we just opted out of the first one.

The only way to get that back if you happen to be playing with those features, the only way to get that back is to go back to your organization summary and hit that "Refresh" button which says reset your application. You hit "Reset", that brings that application back to its original standard that KDHE has published. As you can see now, work plan D111 is still there.

The only issue is if you hit that reset button, there will be multiple warnings that tell you, “You will lose your data.” You do want to be opting out or changing things if you’ve actually built out an application and want to change things. That reset button will remove your data because it will reset it back to what KDHE built for you.

So you would want to just be careful with that and do all of your playing ahead of time. And if you do find yourself in a situation where you need a reset during the application process, please do not do it by yourself. Go ahead and contact Catalyst technical support and we’ll walk you through that process to get your items back without losing any of your original data.

Jane Shirley: Great, thank you. We have another question that I want to answer before we go to the phones and that’s asking about more than one user accessing the system at the same time if they have separate usernames and passwords. Could you answer that one for us, please, Ryan?

Dr. Ryan Loo: It is – it is perfectly fine for individuals to have – to be accessing the applications at the same time. You can have as many individuals as you’d like working within the same system, working side by side, it shouldn’t cause any problem whatsoever. We test this rigorously and that’s just the function of our software that multiple can be saving and working with the system at the same time.

The only issue that you need to be aware of that would cause a problem is if for some reason two people were in the exact same application working on the exact same field at the exact same time. We can’t keep track of both of you. We can only keep track of whoever was the last person to hit save.

So, for example, if two of you are in the exact same field which is what is your reach. And one person types 1,000 and hit save and another person was in the exact same part of the system and hit and saves 1500 for their reach and hit save last, then the only – the only record that will be saved is that 1500. That shouldn’t really occur if you just make sure that individuals are staying out of the same field at the same time. But that’s the only time that you might run into a conflict if (this one) is trying to save something at the same time in the exact same field within your – within an application.

Jane Shirley: Thank you, Ryan. One question that I think I can answer asks about any additional training besides the four Kansas TRAIN courses. We do not have any other formal training that's been developed or is currently available. We do have a couple of excellent guidance documents, those on our Aid to Local Webpage and that are also available on Catalyst. We do have a couple of changes that are obviously coming February 9th and we will be working with the Catalyst support staff to make sure that our guidance documents are fully updated that will go up at the same time so that those will be there and will match what we're telling you.

Another question that has come in is asking about on the profile, how many contacts does one organization – should one organization have listed in the profile?

Dr. Ryan Loo: I'm sorry, what was that question again?

Jane Shirley: In the profile, it asks for contacts. How many staff individual should be listed? Does this limited to the contacts of the users or do they add other staff in that contact area?

Dr. Ryan Loo: That is at your discretion. We don't make any limits or requirements within Catalyst so long as we at least have one main contact person. But (that's for you) to add as many as you like according to your individual program guidance.

So, if a program is saying, "Let's make sure we at least have your human resource person, your administrative and executive director," then go ahead and do that. Another program might say, "Well, we only need your executive director," so that should be fine. That's really a program by program requirement type of thing. But as far as Catalyst is concerned, we have no minimal requirements other than at least one. And you can add in as many as you want that would deem – that you would deem useful in that system.

Jane Shirley: OK. Great, thank you. Another question, do all counties have access to this process? If I submit applications as a parent agency that includes multiple counties, will I be able to have access to the application information for those counties so that I will have what I need to submit the combined application?

Dr. Ryan Loo: That's an interesting – that's an interesting question. I say interesting – well, what happens is a county – each county – yes, all applicants who are applying for funding under Aid to Local have access to the Catalyst system. And they're all submitting their applications under the Catalyst system. Each county and local health department, whoever it might be, whoever the applicants are, each of them have their own username and password and that allows access to all of their applications.

We do not currently have anyone that has access to multiple counties and multiple applicants other than KDHE staff. KDHE, Kansas Department of Health and Environment, they are the ones who have access to all applications multiple counties and that sort of thing. If you're proposing some sort of collaborative or you're working with multiple counties or submitting a multiple county, that would be something that we should probably handle outside of this call since this is more focused on the technical systems you're working with Catalyst.

A collaborative application is a question, what would you say, Jane, send that to you or to the program contact to talk about those issues we are discussing the other day?

Jane Shirley: Right. So my feedback – this is (Christy Frazey) and (Christy), my feedback is let's converse with, I assume, the CDRR and let's converse with that program. We did have this discussion the other day and at this time, my first answer is that we are likely to have to be limited to you having access to your county only and have the decision about your county being the lead and receiving the information from the other counties that you then enter as the lead county. We're a little concerned about giving county to county access because right now since we can't limit what you can view, you may be having access to other applications that are not relevant to the combined application that you are discussing.

But I'll get back to you and also work through the program on the final answer on that.

Those are all the questions we currently have so I'd like to

(Debbie): (Inaudible).

Jane Shirley: (Debbie) says there's one more. About the report? I did that.

(Debbie): OK.

Jane Shirley: OK. (Patsy), if we could open it now to anyone that's on the line that would like to ask a question? Could we do that please?

Operator: Yes, ma'am. If you would like to ask a question, please press star and then the number one on your telephone keypad.

Again, that's star then the number one on your telephone keypad. If you would like to withdraw your question at anytime, simply press the pound key. We'll pause for just a moment to compile the Q&A roster.

And at this time, we don't have any questions in the queue.

Jane Shirley: Oh, all right.

(Debbie): We could do (inaudible).

Jane Shirley: Yes. So I'm also going to have (Debbie) double check and see if we have any additional questions on the Webinar.

(Debbie): Yes.

Jane Shirley: And to the callers, this is your chance to ask questions of our experts at our Catalyst support team. So if you have questions, please bring them up now.

Operator: Again, if you would like to ask a question, please press star and then the number one on your telephone keypad. Again, star one.

And I do have a question from (Karen Hock). (Ms. Karen).

(Karen Hock): Yes. We couldn't get on at the beginning because your – we couldn't hear anything that was being said and how we called in. So I'm not sure what – if you covered this kind of test. But where I'm a little confused as if you would walk through when you actually do the grant, how you are completing that when you break down each section, did you do some of that?

(Debbie): (Inaudible).

Jane Shirley: (Karen), we didn't.

(Debbie): I'm sorry (inaudible).

(Karen Hock): And we've watched the Kansas…

Jane Shirley: Yes.

(Karen Hock): …TRAIN (and we find in the systems) and I thought we (printed) because we went in and open – you know like we went in to (IAP) grant. And we clicked on one of them and we opened – we went to print and we thought we printed all the questions that were there. And now you're telling us that we don't when we print.

Jane Shirley: First of all…

Dr. Ryan Loo: What we…

Jane Shirley: Go ahead, Ryan.

Dr. Ryan Loo: What we discussed earlier in the call was that Catalyst will only print field that actually have responses in them. So, if you're going in right off the bat in printing, it would make sense that it is blank or you might be a little confused as what's being rendered on the page. The solution to that is going to be Jane is instructing the program staff to compile additional guidance documents that basically lays out each of the questions for each of the applications and those will be published. We will provide a notification through Catalyst. You will receive an e-mail notification when those questions – or when those outlines are available. And you should be able to take a look at those which will show you a list of all the sponsors and everything you need to prepare for your – for your submission.

(Karen Hock): So when I printed an (IAP) and entered group A, it said administration and management, goals A1, needing report grant management requirement. It's requirement A.11 and it has a statement, requirement A.12 and it had a statement, require – I mean, that's not telling me everything that I need to do?

Dr. Ryan Loo: That maybe the list of headings. It may not have all of the fields that you need to include or fill out because the fields will not print unless there is content within them. So, the best resource at this point is to view the application within Catalyst. The next best will be the layout that each of the programs will be providing and they will be working on that very, very soon.

(Karen Hock): Well, then, I'm totally confused. I'm sorry, I'm not trying to be but we thought we went through and checked on each field and most of them wouldn't allow us to put anything in like in (IAP)…

Jane Shirley: (Karen)?

Dr. Ryan Loo: (Tamara), go ahead and pull up the graph that she's talking about.

Jane Shirley: (Karen), I believe that I heard from this morning that the (IAP) grant might not have all of the fields in it that – so, yes, let's look at (IAP). The other thing I will mention is I know that there are some of the grants that simply have instructions for what you are going to do. This is – if it just says you are expected to do this and you are expected to do this, there may not be anything for you to fill out. It may simply be indicating what you're expected to do. So for this one, you're expected to provide quarterly certified affidavit of expenditures and biannual progress reports of activities towards objectives for their award.

This is simply stating to you, this is what you will be expected to do. There's nothing for you to do with this. It will then show up in your contract that that's what you're expected to do. So when you submit your application, you've agreed to do this.

(Karen Hock): So when we looked at Catalyst online, we couldn't say anything in the date line or in the end line. It didn't allow us. When we clicked on goal and then requirement, there was no – we couldn't fill out any fields.

Dr. Ryan Loo: That's correct. If you take a look, you can see on the screen that we're rendering right now, Jane just read the description to you. That is the only item that immunization is requiring. You look down at custom field, there are no custom field. Whereas, (Tamara), if you pull up another grant…

(Karen Hock): So that's…

Dr. Ryan Loo: …and show…

(Karen Hock): …(how this was to it). And the only custom field that there is in the immunizations was one that said to attach a (Mogi) plan. And that printed off when we printed the sheet that it told us to attach this (Mogi) plan.

Dr. Ryan Loo: Yes.

Jane Shirley: Right. So in the attachment…

Dr. Ryan Loo: Yes.

Jane Shirley: …then, you will attach the (Mogi) plan. Otherwise, if it doesn't have anything for custom fields, you are not required to fill anything out. You are simply agreeing to what it says in the description will be your activities for that grant.

Dr. Ryan Loo: And here's an example on the screen from State Formula of questions that would appear in the custom field. There weren't any on the (IAP) – I'm sorry, I forgot that that was immunization. That makes sense now. Immunization doesn't have a lot of custom fields. Whereas, here you can see there are custom fields to fill out.

(Karen Hock): Right in the questionnaire, OK?

Dr. Ryan Loo: Yes. Each application is different.

Jane Shirley: So I think, (Karen), I think it will help you a lot when we develop these lists of what you are actually – what you're going to be expected to complete. So I think that's the other thing is where are these places in the grant application that you are expected to complete something. So we've be developing those and hope to have those early to mid next week. We will let everyone know when those are available.

(Karen Hock): OK.

Jane Shirley: Great. Are there any other questions, (Patsy)?

Operator: Yes, ma'am, we do have one other question from (Pam) – where is (Pam Hadjo), she had – she took her question out of the queue so we're all clear to go.

Jane Shirley: All right. (Debbie), do we have any questions online?

(Debbie): No.

Jane Shirley: No questions online. Last chance, it's 4:26. And…

Operator: And it's star one.

Jane Shirley: Thank you. Any other questions? We'll give them a minute or two.

All right. I will just rev – yes.

(Debbie): Did you want to tell them the dates of the program…

Jane Shirley: Sure.

(Debbie): …(the different programs we have).

Jane Shirley: A couple of wrap up comments. There are a few programs that are scheduling conference calls about their particular application. The pregnancy maintenance initiative, the PMI is going to be February 5th at 1:30. And I – we will – we will send out these dates to everyone again to be sure you get them. The teen pregnancy program will have a conference call on February

6th at 9:30, again, about their individual application process. Maternal child health, we're having two. They will be on February 5th and 6th at 12 o'clock noon. And healthy families will be February 6th at 1:30. Those will be conference calls about their individual applications.

Again, we will have transcripts that we will take from both of today's Webinars. We will combine the questions and answers and we will post those on our Aid to Local front page. And you will be able to access those there. And we will also be posting the Web – the PowerPoint the Ryan did today so that you'll be able to go back and review that if you – if it's something there you'd like to see again.

Last chance. (Patsy), any questions?

Operator: No, ma'am. There are no – I do have one. OK, (Karen) has a follow-up question. (Karen).

(Karen Hock): Yes, I was just clarifying on Formula Grant. So all you're asking us to put in, in the budget is the amount of money that we are receiving.

Jane Shirley: Correct. You will (just fit) that in the miscellaneous – I can't remember, it's miscellaneous or others when those – whatever that general category is. If you want to double check that, go to our Aid to Local Web page and you'll be able to get the – Kevin, what's that document called?

(Karen Hock): It says…

Jane Shirley: Anyway…

(Karen Hock): …document…

Female: (Inaudible).

(Karen Hock): Right down…

Jane Shirley: Right.

(Karen Hock): Yes. They have that.

Jane Shirley: Right. Yes. All of the counties and what they – for this year, what that total would be. So you just need to put that – just that total in to the budget.

(Karen Hock): And that's all we put in there, OK. So that's…

Jane Shirley: Yes.

(Karen Hock: …what we finally found, I'm looking through that. All right.

Jane Shirley: Great. Wonderful, OK. Super. All right, if there are no further questions, thank you everyone for joining us today. And have a good evening.

Dr. Ryan Loo: Thank you.

Operator: Thank you and this concludes today's conference call. You may now disconnect.

Jane Shirley: Thank you, (Patsy).

Operator: Yes, ma'am, thank you. It was a pleasure. Bye-bye.

Jane Shirley: Bye-bye.

END